

# Generating CO Pick Lists with Inventory Availability Check

Web based CO Pick List Generation for PPS Customers

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# A new way to generate CO Pick Lists

- Cistech is offering, free of charge to PPS users, software that can be used to select Customer Orders for pick list printing
- This is a web-based software that does not consume an XA license
- The software is consistent in design with Cistech's *Shop Floor Plus* applications
- System tailoring provides controls for customization
- Multiple fields (date, customer, item, etc.) can be used to display a list of potential orders
  - Orders with holds are displayed but flagged
  - Application will calculate inventory availability for each item and flag items that will have potential shortages

# Pre-requisites

- Customer Order Management (COM)/Customer Service Management (CSM)
  - This application is run in addition to the Pick List print options in COM/CSM
- Production Monitoring & Control (PMC)
  - Utilizes the Employee Master file in PM&C for badge numbers
- Inventory Management (IM)/Materials Management (MM)
- XA release 9.0 and higher
- Operating System V6R1 or higher
- IBM I HTTP Server-standard feature in operating system

# Selection Screen



**JIM SIMUNEK**

**Generate Pick Lists**

Company: **01** Warehouse: **B**

Return

Current Picklist build exists. Pressing submit will delete prior selection.

Enter Date Range:   Through  

Company:	1 ACME PRODUCTS
Submitted on:	06/10/2020 07:37 AM
Completed on:	06/10/2020 07:37 AM

Review

### Optional:

Customer:   
Sales Order:   
Item:   
Created by:   
Terms Code:   
Display Held Orders: Yes   
Consume Inventory by Ord/Qty: Quantity   
Consume Inventory by Date: Request   
Ship Complete:   
Business Unit:

Submit

Powered by Cistech, the Infor XA Experts

### NOTES:

From Date - leave blank to include earliest of selected date

Through Date - leave blank to include all future orders of selected date



# Pick List Generation

Company: **1** Warehouse: **B** From: **00/00/00** Through: **12/31/20** Build Completed on: **06/10/2020 07:37 AM**

Delete Build

Unselect All

Toggle Short/All

Update Changes

Create Pick Lists

Return

2 Pick Lists Selected for Release

Crt	Order	Customer Name	Dest.	Shp Cmp	Bus. Unit	Carrier	BO	Crt PL Itm	Item	Description	Req	Open Qty	Avail to Pick	On Hand	Proj Bal	Ttl Dmd
<input type="checkbox"/>	86099	CARRIER CORP (NY)	CT	0	UNK		Y	<input type="checkbox"/>	245005	VS - 5 TON MINNTRONIX LINE	05/26/20	100	0	48	0	
	86099	CARRIER CORP (NY)	CT	0	UNK		Y	<input checked="" type="checkbox"/>	244107	Hardware, Bolts ABC	05/26/20	100	100	501	251	150
	86099	CARRIER CORP (NY)	CT	0	UNK		Y	<input type="checkbox"/>	244168	Hardware, Bolts 1 x 4.5	05/26/20	150	0	101	0	400
	86099	CARRIER CORP (NY)	CT	0	UNK		Y	<input checked="" type="checkbox"/>	244187	Hardware, Bolts 2.5 x 2.2	05/26/20	150	150	634	334	50
	86099	CARRIER CORP (NY)	CT	0	UNK		Y	<input type="checkbox"/>	244189	Hardware, Bolts, 1.3 x 5.2	05/26/20	150	114	224	0	100
	86099	CARRIER CORP (NY)	CT	0	UNK		Y	<input checked="" type="checkbox"/>	244194	Hardware, Screws 3.3	05/26/20	150	150	2115	1715	100
	86099	CARRIER CORP (NY)	CT	0	UNK		Y	<input type="checkbox"/>	244213	G - SINGLE PACK BASE PAD 12", "	05/26/20	150	0	1807	0	150
	86099	CARRIER CORP (NY)	CT	0	UNK		Y	<input type="checkbox"/>	244217	Hardware, Screw Set ABC	05/26/20	150	0	1740	0	
	86099	CARRIER CORP (NY)	CT	0	UNK		Y	<input checked="" type="checkbox"/>	244229	Hardware, Nut 3.5	05/26/20	175	175	7990	4615	500
	86099	CARRIER CORP (NY)	CT	0	UNK		Y	<input type="checkbox"/>	244304	G/TR - SHIPPING BASE	05/26/20	200	0	484	0	
<input type="checkbox"/>	86103	ALMOAYYED A/C CONTRACTING	BH	0	UNK		Y	<input checked="" type="checkbox"/>	034002	A - HOUSING BLANK, .108" TK	05/27/20	100	100	784	264	
	86103	ALMOAYYED A/C CONTRACTING	BH	0	UNK		Y	<input checked="" type="checkbox"/>	034003	B - HOUSING BLANK, .100 THK	05/27/20	100	100	894	794	
<input checked="" type="checkbox"/>	86104	AIR INNOVATIONS	NY	0	UNK		Y	<input checked="" type="checkbox"/>	034001	B - HOUSING BLANK .108" TK	05/27/20	100	100	500	200	100
	86104	AIR INNOVATIONS	NY	0	UNK		Y	<input checked="" type="checkbox"/>	034002	A - HOUSING BLANK, .108" TK	05/27/20	100	100	784	64	
	86104	AIR INNOVATIONS	NY	0	UNK		Y	<input checked="" type="checkbox"/>	034003	B - HOUSING BLANK, .100 THK	05/27/20	100	100	894	594	
<input checked="" type="checkbox"/>	86105	BELIEF TRADING COMPANY	KR	0	UNK		Y	<input checked="" type="checkbox"/>	034001	B - HOUSING BLANK .108" TK	05/27/20	100	100	500	300	100
	86105	BELIEF TRADING COMPANY	KR	0	UNK		Y	<input checked="" type="checkbox"/>	034002	A - HOUSING BLANK, .108" TK	05/27/20	100	100	784	164	
	86105	BELIEF TRADING COMPANY	KR	0	UNK		Y	<input checked="" type="checkbox"/>	034003	B - HOUSING BLANK, .100 THK	05/27/20	100	100	894	694	
Hld	86072	AIRE FRIO S.A. DE C.V.	HN	0	UNK		Y		303567	B - H9BB MOTOR CAP ASSEMBLY,	02/14/20	200	0	1	0	
<input type="checkbox"/>	86073	AIRE FRIO S.A. DE C.V.	HN	0	UNK		Y	<input type="checkbox"/>	303538	J82 - MOTOR CAP ASSEMBLY,	03/26/20	10	2	2	0	
	86073	AIRE FRIO S.A. DE C.V.	HN	0	UNK		Y	<input type="checkbox"/>	303541	J82 - MOTOR CAP ASSEMBLY,	03/26/20	10	0	304	0	
	86073	AIRE FRIO S.A. DE C.V.	HN	0	UNK		Y	<input type="checkbox"/>	303552	B - MOTOR CAP ASEM, 2.462 CAP,	03/26/20	10	2	2	0	
	86073	AIRE FRIO S.A. DE C.V.	HN	0	UNK		Y	<input type="checkbox"/>	303540	J82 - MOTOR CAP ASSEMBLY,	03/26/20	25	4	4	0	
	86073	AIRE FRIO S.A. DE C.V.	HN	0	UNK		Y	<input type="checkbox"/>	703374	H2DA463DBFA (AL) 575-3-60	03/26/20	120	14	14	0	
	86073	AIRE FRIO S.A. DE C.V.	HN	0	UNK		Y	<input type="checkbox"/>	439410	J - BM2 UPPER HSG SUB-ASSEM	03/26/20	150	0		0	

# Item Availability Calculation

- Begins with the Item Location (SLQNTY) file to calculate the available inventory
  - Locations with 'Location Status' = IN TRANSIT will be ignored
  - Locations with inventory 'Waiting Inspection', 'Rejected' or 'Shelf Life Expired' will be ignored
  - All other locations will be used to calculate 'total on hand'
    - User Exit program can be used to specify other locations that should be excluded
    - MO allocations, CO pick list quantities including CO Discrete Allocations will be subtracted from the 'total on hand' to determine 'beginning available'
    - System Tailoring specifies date field to use to consume the 'total on hand' inventory
- Orders/Items with sufficient inventory will automatically be flagged for printing

# System Tailoring

- Date selection
  - User selects which date field to use:
    - Order Dates:
      - Request
      - Manufacturing Due
    - Item Dates:
      - Request
      - Promise
      - Manufacturing Due
      - Original Manufacturing Due
- CO sequence on display screen: Order or Date

# User Exits

- The application has several user exits:
  - Option to add 2 additional order header and 2 additional item detail fields to the selection screen
  - User exit program to exclude specific locations from the Availability check
- Source is provided for all user exit programs

# Hyperlinks

- Customer Order
  - Single clicking on a CO number will bring up a screen showing all information from the customer order
  - Includes a comment text field for input of in house messages/notes that will only be displayed within the CO selection
- Location Inventory
  - Single click on the Quantity On Hand field will bring up a window with the location detail information for the item

# Demo

# Conclusion

- This application will assist the person in the company who decides which Customer Orders to pick/ship
- Once selected, the orders are sent to the XA Pick List Print programs
  - The Cistech application allows the user to select the orders for pick list print but it is XA that actually generates the pick list
  - CO order status will be changed from 10 to 15 when pick is generated
- CO order, on hand and available inventory quantities will assist the user in deciding which CO's to select for pick list print
- To request/schedule installation of this application, please e-mail: [Support@Cistech.Zendesk.com](mailto:Support@Cistech.Zendesk.com) or your Cistech Sales Representative